

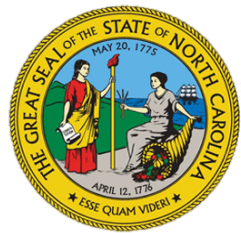
# North Carolina COVID-19 Vaccine Management System (CVMS)

## Provider Portal

### Receiving & Processing Vaccine Shipments User Guide

Version 15

May 14, 2021



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the  
CVMS Help Desk Portal\* at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

You can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 1. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

\* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

*NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)*

*For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021*

3. You will receive an e-mail with your username and temporary password to log into the portal

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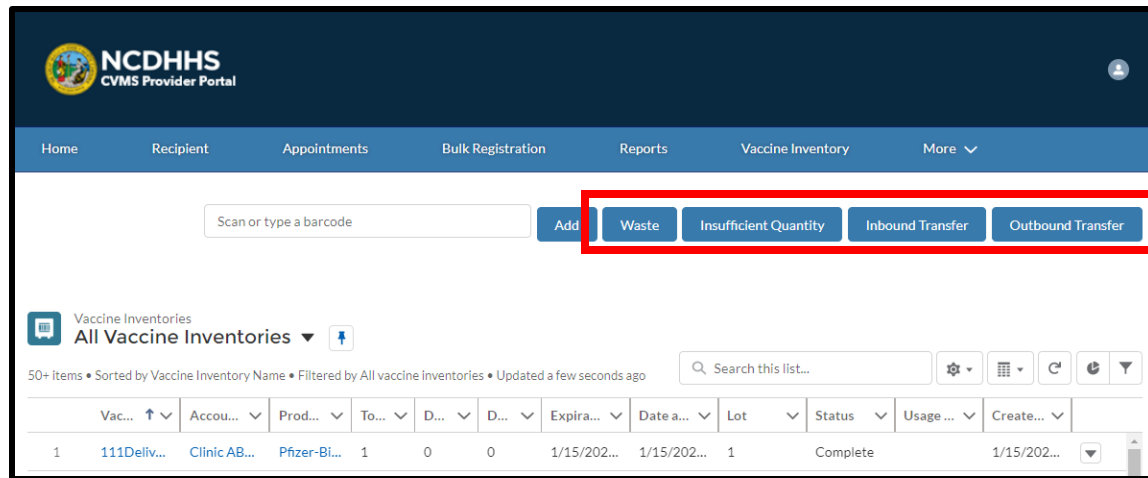
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# Overview

# Overview

Receiving and processing COVID-19 vaccine inventory shipments typically involves:

1. Reviewing the Vaccine Inventory Shipment Record
2. Adding Vaccine Inventory
3. Receiving inbound COVID-19 vaccine transfers or redistributions
4. Updating the Vaccine Inventory Record
5. Marking the Vaccine Inventory Record Complete



**NCDHHS CVMS Provider Portal**

Home Recipient Appointments Bulk Registration Reports Vaccine Inventory More

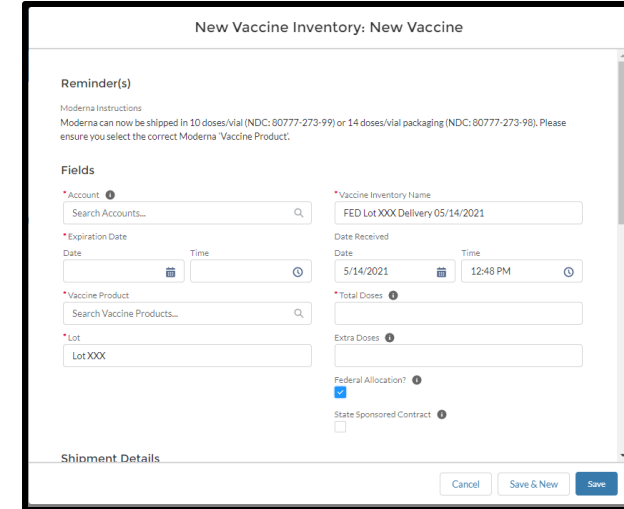
Scan or type a barcode **Add** Waste Insufficient Quantity Inbound Transfer Outbound Transfer

Vaccine Inventories  
All Vaccine Inventories

50+ Items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Vac...	Accou...	Prod...	To...	D...	D...	Expira...	Date a...	Lot	Status	Usage...	Create...
1	111Deliv...	Clinic AB...	Pfizer-Bi...	1	0	0	1/15/202...	1/15/202...	1	Complete	1/15/202...



**New Vaccine Inventory: New Vaccine**

**Reminder(s)**  
Moderna Instructions  
Moderna can now be shipped in 10 doses/vial (NDC: 80777-273-99) or 14 doses/vial packaging (NDC: 80777-273-98). Please ensure you select the correct Moderna Vaccine Product.

**Fields**

\* Account

\* Vaccine Inventory Name

\* Expiration Date  
Date  Time

\* Vaccine Product  
Search Vaccine Products...

\* Lot

\* Total Doses

\* Extra Doses

Federal Allocation ☒

State Sponsored Contract ☐

**Shipment Details**

Cancel Save & New Save

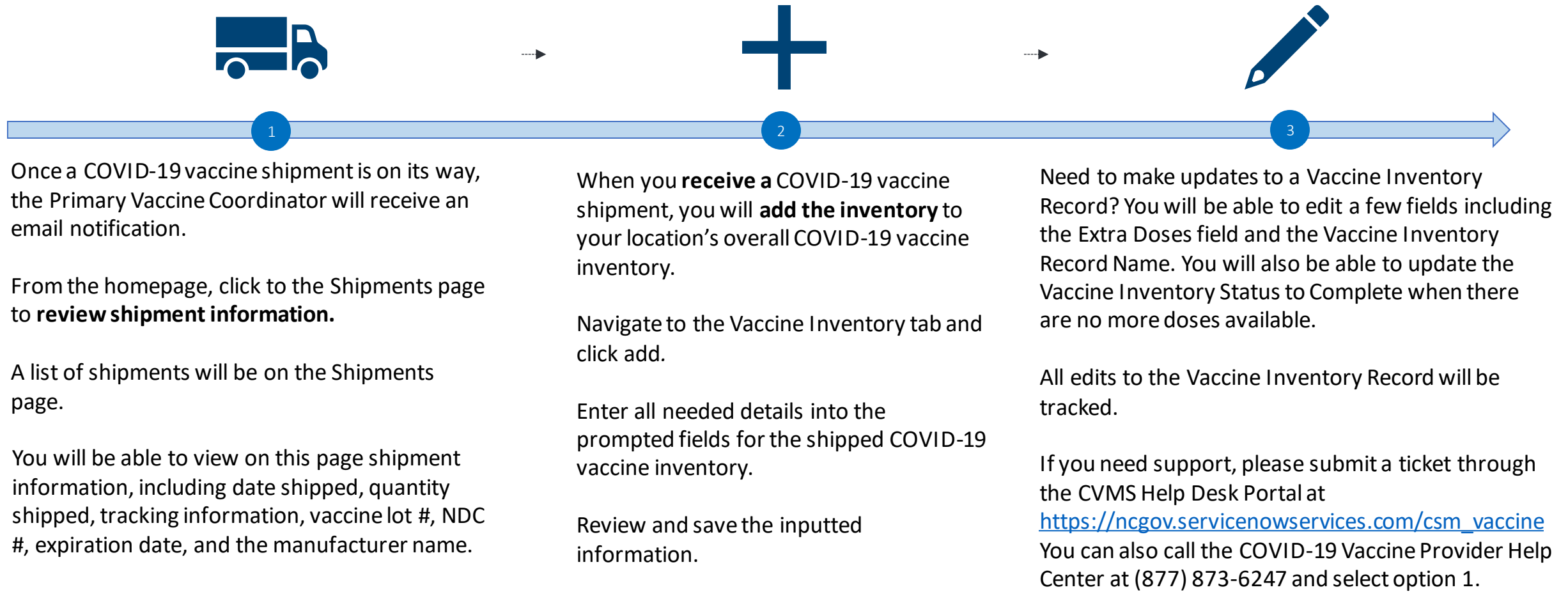
The processes included in this training are for users with a **Healthcare Location Manager** profile only.

*Additionally, you will need to:*

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov>

**Now, let's get started!**

# Overview of the COVID-19 Vaccine Inventory Receiving Process



# Key Terms

---

## Wastage

Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.

## Insufficient Quantity

COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type is able to be administered to recipients.

## Vaccine Deprecation

Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines are reduced by the amount of COVID-19 vaccines administered, wasted, lost, or not received.

## Vaccine Inventory Shipment details

Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).

## Extra Doses

Extra Doses are any additional doses that are administered beyond what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.

## Redistribution

Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

## Transfer

Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

# Receiving COVID-19 Vaccine Shipment Notification

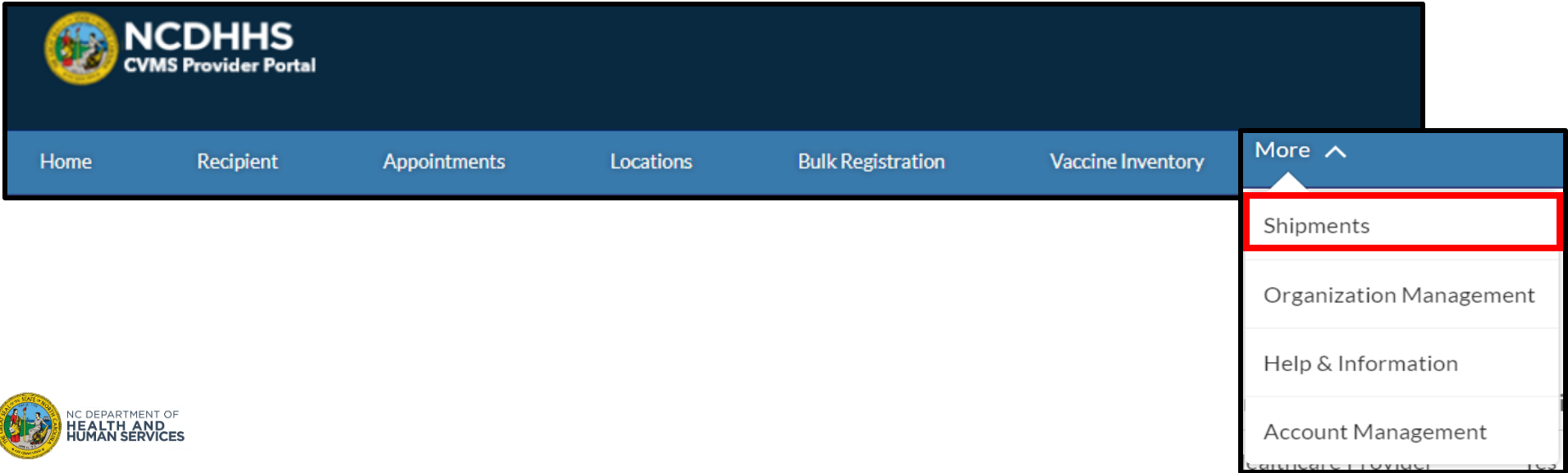


# Step 1 of 4: Navigate to Shipments

It is important to maintain accurate COVID-19 vaccine inventory levels for the location(s) that you support to remain in alignment with the CDC’s COVID-19 vaccine guidelines. Once a COVID-19 vaccine Inventory shipment is on its way, a **VACCINE SHIPMENT RECORD** will be available for you to review in your **SHIPMENTS TAB**.

The Primary Vaccine Coordinator will also receive an **EMAIL NOTIFICATION** when a **VACCINE INVENTORY SHIPMENT** is on its way to your location.

- 1. At the top of your home page, locate the **MORE TAB**
- 2. Click **SHIPMENTS**
- 3. After clicking **SHIPMENTS**, you will be directed to the **SHIPMENTS PAGE**



## Audience

Healthcare  
Location Manager

## Tips

The Primary Vaccine Coordinator will be notified when a COVID-19 vaccine shipment is on its way. The Primary Vaccine Coordinator was identified by the Organization Administrator during the enrollment process in the CVMS Provider Enrollment Portal.

NOTE: Shipment information for Federal COVID-19 vaccine allocations to Federal Pharmacy Partners will NOT be provided in CVMS.

# Step 2 of 4: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed list view. To see all your Shipment Records, you will have to switch to the 'All Shipment' records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click **ALL SHIPMENTS**
- 3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Shipment

Recently Viewed

2 items

LIST VIEWS

All Shipments

✓

Recently Viewed (Pinned list)

1

SHIP-0000000

8 (Quantity) & U6828AA (Lot) & 110011 (Order ID)

Pfizer

59267-1000-01






## Audience

Healthcare  
Location Manager

# Step 3 of 4: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The **VACCINE SHIPMENT RECORD** will be **RELATED** to an **ORDER RECORD**. This means that your Vaccine Shipment record will always be associated to a specific order.

- 1. Locate the **SHIPMENT ID**
- 2. Click the **SHIPMENT ID HYPERLINK**
- 3. You will be directed to the **VACCINE SHIPMENT RECORD**

Home   Recipient   Appointments   Locations   Bulk Registration   Vaccine Inventory   More ▾									
Shipment All Shipments ▾ 									
14 items • Sorted by Quantity Shipped • Filtered by All shipment • Updated 3 minutes ago									
<input type="text" value="Search this list..."/>    									
	Shipment ID ▾	Quantity... ▾ ▾	Quantity R... ▾	NDC ▾	Manufacturer ▾	Lot Number ▾	Created Date ▾	Shipment Tracking ... ▾	Delivery Number ▾
1	SHIP-0000004	197	200	78978-7878-89	Moderna	U6828AA	12/4/2020, 6:14 PM	30001	101
2	SHIP-0000013	140	150	59267-1000-01	Pfizer	564645	12/5/2020, 12:26 AM	67867886	12345654
3	SHIP-0000002	100	100	59267-1000-01	Pfizer	U6828AB	12/4/2020, 4:28 PM	34354545455	123123123

## Audience

Healthcare  
Location Manager

## Tips

You can use the SEARCH BAR to search for a record. Clicking on column header will sort by the column.

For example, you may choose to sort by SHIPMENT DATE.

# Step 4 of 4: Navigate to the Shipment Details

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

SHIP-0004228

DETAILS

RELATED

Information

Shipment ID  
SHIP-0004228

Order  
ORD-0004057

Order Product  
0000003758

Date Shipped (MM/DD/YYYY)  
9//21/02/1

Account  
Solutions Loc1

Status  
Shipped

Primary Coordinator Email

Email Sent to Primary Location Coord  
☒

VTicks Shipping File

Delivery Number  
007+16

Delivery Line Number  
7

Date Shipped  
02/19/21

Quantity Requested  
1,000

Lot Number  
111111

Lot Expiration Date  
12/31/21

On the Shipment record, you will be able to **REVIEW DETAILS** about your expected order including:

- Date Shipped
- Quantity Shipped
- Tracking Information
- Lot #
- NDC #
- Expiration Date
- Manufacturer

1. On the Shipment record, click on the **DETAILS TAB**

## Audience

Healthcare  
Location Manager

## Tips

Review specific details about your order.

# COVID-19 Vaccine Shipment Email Notification

Primary Vaccine Coordinators will be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

The Primary Vaccine Coordinator will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Date Shipped
- Quantity Shipped
- Manufacturer
- NDC Number
- Lot Number
- ExIS Order Number
- Carrier
- Shipment Tracking Number

*Note: Email will come from [nccvms@dhhs.nc.gov](mailto:nccvms@dhhs.nc.gov)*

Hello John Smith,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Vaccine Details:

- Date Shipped: 02/01/2021
- Quantity Shipped: 300
- Manufacturer: Moderna TX
- NDC: 80777-0273-99
- Lot Number: 032L20A
- ExIS Order ID: FLU920001FC01302021


Shipment Tracking Information:

- Carrier: UPS1
- Shipment Tracking Number: 1Z126W010100941170

Need support? Submit your question to the help desk here: [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).

Thank you, NC Department of Health and Human Services

Division of Public Health

 NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**

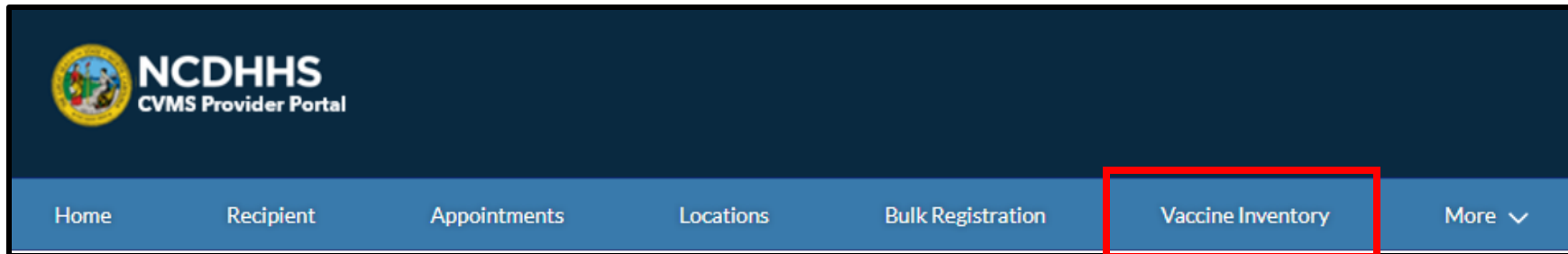
# Adding COVID-19 Vaccine Inventory

## Step 1 of 7: Navigate to the Vaccine Inventory tab

When you **PHYSICALLY RECEIVE** a COVID-19 vaccine inventory shipment for any COVID-19 vaccine type, you will want to **ADD THE INVENTORY** to your location's overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

*This process **DOES NOT** include processing inbound COVID-19 vaccine inventory transfers or redistributions. Please see the Receiving a COVID-19 Vaccine Transfer / Redistribution section for steps on how to process inbound transfers or redistributions.*

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



### Audience

Healthcare  
Location Manager

### Tips

NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.

# Step 2 of 7: Create a New Vaccine Inventory Record

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the **CVMS PROVIDER PORTAL INVENTORY DEPRECATION, TRANSFER, AND REDISTRIBUTION USER GUIDE** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) to learn more about COVID-19 vaccine Wastage, Insufficient Quantities, and Redistribution / Transfer processes.

- 1. Click **ADD**
- 2. After clicking add, you will be prompted to **PROVIDE ADDITIONAL VACCINE DETAILS**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Print

Filter

Vaccine Inv...

Account N...

Product Name

To...

D...

D...

Expiration Da...

Date and Tim...

Lot

Status

Usage (First o...

Created Date

## Audience

Healthcare  
Location Manager

## Tips

By Default, the view is set as “Recently Viewed”, therefore the list will seem empty at first.

Change the view to “All Vaccine Inventories” and click the THUMBNAIL icon to PIN your favorite list view.



## Step 3 of 7: Enter Vaccine Inventory Information

New Vaccine Inventory: New Vaccine

Reminder(s)

Moderna Instructions  
Moderna can now be shipped in 10 doses/vial (NDC: 80777-273-99) or 14 doses/vial packaging (NDC: 80777-273-98). Please ensure you select the correct Moderna 'Vaccine Product'.

Fields

\* Account ⓘ  
Search Accounts... 🔍

\* Vaccine Inventory Name  
Delivery 05/14/2021

\* Expiration Date  
Date Time  
Date: [Calendar Icon] Time: [Clock Icon]

\* Vaccine Product  
Search Vaccine Products... 🔍

\* Lot  
[Text Field]

\* Total Doses ⓘ  
[Text Field]

Extra Doses ⓘ  
[Text Field]

Federal Allocation? ⓘ  
☐

State Sponsored Contract ⓘ  
☐

Shipment Details

Cancel Save & New Save

For more information on Extra Doses, see page 'Entering Extra Doses'.

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS**.

### 1. Populate all required **VACCINE INVENTORY FIELDS**

- Account (Do not create a new Account)
- Vaccine Inventory Name (*editable*)
- Expiration Date
- Date and Time Received
- Vaccine Product
- Total Doses
- Lot #
- Federal Allocation?
- State Sponsored Contract

### 2. Continue to **SHIPMENT DETAILS**

## Audience

Healthcare  
Location Manager

## Tips

When adding Inventory into CVMS, we recommend including the Lot #'s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

Shipments from **DIFFERENT LOT NUMBERS** must be entered as separate Inventory records.

## Step 4 of 7: Enter Shipment Details

New Vaccine Inventory: New Vaccine

Fields

\* Account ⓘ  
Search Accounts... 🔍

\* Expiration Date  
Date Time  
Date Received  
Date Time  
3/2/2021 11:05 AM

\* Vaccine Product  
Search Vaccine Products... 🔍

\* Lot

\* Vaccine Inventory Name  
Delivery 03/02/2021

\* Total Doses ⓘ

\* Extra Doses ⓘ

Shipment Details

Shipment  
Search Shipment... 🔍

Unable to locate Shipment record ⓘ  
☐

Inventory Instructions and Assistance

Extra Dose Instructions  
Use the 'Extra Doses' field when you are able to get more doses than expected out of a vial. This field is editable at time of Vaccine Inventory record creation and up until the last dose is administered. For example, if you receive 195 Vials of Pfizer-BioNTech, enter 975 in Total Doses. If you are able to ultimately administer 1175 doses, the Extra Doses will either equal 200 (1175 minus 975) OR will equal 5 (1175 minus 1170), depending upon if the expectation is 5 (pre 2/16/21 Order) or 6 (post 2/16/21 Order) doses per vial. Your 'Doses Available' will automatically recalculate to include any Extra Doses you have added.

Inventory Creation Instructions  
Note: Please double-check Total Doses, Lot, and Expiration Date are correct before saving as these are important for Reporting & Administration. Please search & select an existing record when choosing an Account; do NOT click '+ Create Account'. If you require assistance creating/updating an Inventory record, or have any questions about the CDC COVID-19 Vaccination Program Inventory Management process, please submit your question to the help desk here:  
[https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

System Information

Cancel Save & New Save

You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECIATION**.

1. Select a **SHIPMENT RECORD**
2. If you cannot locate the Shipment record, **CHECK** the **UNABLE TO LOCATE SHIPMENT RECORD** box
3. Before saving, **REVIEW** all entered details
4. Click **SAVE**

### Audience

Healthcare  
Location Manager

### Tips

You may click **SAVE & NEW** to process / add additional Vaccine Inventory records.

Vaccine Pfizer products Ordered on or after January 26 should be logged as the 6 doses/vial Pfizer product (not 5) so that inventory is being tracked per more recent guidance from the CDC. Vaccine Pfizer products Ordered before January 26 should be logged as the 5 doses/vial Pfizer product.

## Step 5 of 7: Entering Extra Doses

If you know you will have extra doses, you can update the **EXTRA DOSES** field. You will be able to update this field later to reflect the actual number of extra doses administered.

For an example on when to record **EXTRA DOSES**, please see the **INVENTORY INSTRUCTIONS AND ASSISTANCE** image below.

*Note: Entering in Extra Doses is not a required field.*

### Audience

Healthcare  
Location Manager

### Tips

The Extra Doses field is editable at time of Vaccine Inventory record creation and up until the last dose is administered.

#### New Vaccine Inventory: New Vaccine

##### Reminder(s)

###### Moderna Instructions

Moderna can now be shipped in 10 doses/vial (NDC: 80777-273-99) or 14 doses/vial packaging (NDC: 80777-273-98). Please ensure you select the correct Moderna 'Vaccine Product'.

##### Fields

###### \* Account ⓘ

###### \* Expiration Date

Date   
Time

###### \* Vaccine Product

###### \* Lot

###### \* Vaccine Inventory Name

###### Date Received

Date   
Time

###### \* Total Doses ⓘ

###### Extra Doses ⓘ

###### Federal Allocation? ⓘ

☐

###### State Sponsored Contract ⓘ

☐

##### Shipment Details

[Cancel](#)[Save & New](#)[Save](#)

### Inventory Instructions and Assistance

#### Extra Dose Instructions

Use the 'Extra Doses' field when you are able to get more doses than expected out of a vial. This field is editable at time of Vaccine Inventory record creation and up until the last dose is administered. For example, if you receive 195 Vials of Pfizer-BioNTech, enter 975 in Total Doses. If you are able to ultimately administer 1175 doses, the Extra Doses will either equal 200 (1175 minus 975) OR will equal 5 (1175 minus 1170), depending upon if the expectation is 5 (pre 2/16/21 Order) or 6 (post 2/16/21 Order) doses per vial. Your 'Doses Available' will automatically recalculate to include any Extra Doses you have added.

#### Inventory Creation Instructions

Note: Please double-check Total Doses, Lot, and Expiration Date are correct before saving as these are important for Reporting & Administration. Please search & select an existing record when choosing an Account; do NOT click '+ Create Account'. If you require assistance creating/updating an Inventory record, or have any questions about the CDC COVID-19 Vaccination Program Inventory Management process, please submit your question to the help desk here:

[https://hcgov.servicenowservices.com/csm\\_vaccine](https://hcgov.servicenowservices.com/csm_vaccine)

# Step 6 of 7: Review the Vaccine Inventory Record

After clicking save, you will be directed to the **VACCINE INVENTORY RECORD**. Your total COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your **VACCINE INVENTORY HIGHLIGHT PANEL** will reflect ongoing **DOSAGE ACTIVITY** for this inventory.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Vaccine Inventory

Delivery 02/12/2021

Request Transfer/Redistribution

Change Status

Edit

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
<a href="#">Clinic ABC Loc 1</a>	20		20	0	0

DETAILS

RELATED

▼ Vaccine Inventory Details

Vaccine Product

[Moderna \(10 MDV\) COVID-19 Vaccine](#)

Lot

34

Expiration Date (MM/DD/YYYY)

2/12/2021, 12:00 PM

Usage (First or Second Doses)

First Dose only (100%)

Total Vials

2

Vaccine Inventory Name

Delivery 02/12/2021

Account

[Clinic ABC Loc 1](#)

Date and Time Received (MM/DD/YYYY)

2/12/2021, 8:18 AM

Status

Available

Federal Allocation?


☐

## Audience

Healthcare  
Location Manager

## Tips

Review the Highlight Panel at the top of the Vaccine Inventory Record.

 NC DEPARTMENT OF  
HEALTH AND  
HUMAN SERVICES

20

# Step 7 of 7: Switch Inventory List Views

You will see a **LIST VIEW** on the vaccine inventory page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventory Records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click **ALL VACCINE INVENTORIES**
- 3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

1 item • Updated a few seconds ago

Vaccine Inventory ...

Product

1

Delivery 02/12/2021

Moderna

Home

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Locations

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Vaccine Inventory

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

1 item •

LIST VIEWS

All Vaccine Inventories

Doses Lost In Transit

Inbound Transfers

Outbound Transfers

Recently Viewed (Pinned list)

Search this list...

ose...

Expiration Date (M...

Date and Time Re...

Usage (First or Seco...

Account Name

0

2/12/2021, 12:00 PM

2/12/2021, 8:18 AM

First Dose only (100%)

Clinic ABC Loc 1

## Audience

Healthcare  
Location Manager

## Tips

Click the THUMBNAIL icon to PIN your favorite list view.

# Declaring Vaccine Allocation Availability

## Step 1 of 2: Navigate to the Account Record (Location)

You will be able to adjust your availability to receive COVID-19 vaccine inventory each week for your location in the CVMS Provider Portal. It is important that you **UPDATE YOUR AVAILABILITY BY MONDAY AT 10:00 AM EACH WEEK** if you want your adjustment to be considered for vaccine allocation planning.

If you indicate **YES**, that means your location is able to receive COVID-19 vaccine inventory that week if allocated. If you indicate **NO** because you do not have storage or capacity, your location will not be allocated COVID-19 vaccine inventory until you update your preference.

1. From the Account Management tab, click the **ACCOUNT NAME (LOCATION)**

[illegible]

## Audience

## Healthcare Location Manager

## Tips

If you have multiple locations, make sure to update each location's Allocation Availability each week as appropriate.

You can also get to the Account Record (Location) from the Vaccine Inventory tab and clicking on the Account Name (Location) field from any row of vaccine inventory records.

# Step 2 of 2: Update Your Location's Availability to Receive COVID-19 Vaccine Inventory

From your Account (Location) Record, you can use the **CHANGE ALLOCATION AVAILABILITY** button to certify that your location is able to receive and administer additional vaccine if allocated. This **VALUE DOES NOT RESET OR AUTOMATICALLY UPDATE EACH WEEK**. It will remain the same as the last updated value until you change it.

Your location's **ALLOCATION AVAILABILITY STATUS** is defaulted to **YES** upon registration.

- 1. From the Account Record (Location), click the **CHANGE ALLOCATION AVAILABILITY** button
- 2. Select **YES** or **NO** from the drop-down menu
- 3. Click **SAVE**

## Audience

Healthcare  
Location Manager

## Tips

Once you select Yes or No for a location, this selection will remain until you change it.

HomeRecipientAppointmentsBulk RegistrationVaccine InventoryShipmentsMore

Account Solutions Hospital

Change Allocation Availability

Available to Receive Vaccine Allocation

Instructions (Available to Receive Vacs)

Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the site moves it to 'Yes.')

Change Allocation Availability

\* Available to Receive Vaccine Allocation

Yes

Instructions (Available to Receive Vacs)

Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the site moves it to 'Yes.')

Cancel

Save



# Receiving a COVID-19 Vaccine Transfer / Redistribution

# Step 1 of 4: Processing an Inbound Transfer

If you are **RECEIVING** an **INBOUND TRANSFER / REDISTRIBUTION** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound transfer / redistribution, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound transfers / redistributions from the **ADD INVENTORY PROCESS**.

- 1. From the home page, click **VACCINE INVENTORY**
- 2. Click **INBOUND TRANSFER**

## Audience

Healthcare  
Location Manager

## Tips

Inbound transfers / redistributions are not processed from the Add Inventory Process.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Vaccine Inv...

Account N...

Product Name

To...

D...

D...

Expiration Da...

Date and Tim...

Lot

Status

Usage (First o...

Created Date

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# Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming transfers / redistributions to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

- 1. Select the correct **VACCINE INVENTORY** record
- 2. Click **NEXT**

## Audience

Healthcare  
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Previous

Please select the incoming vaccine transfer for which you are confirming receipt.

<input type="checkbox"/> Vaccine Inventory Name	Product ID	Account Name	Status	Incoming Transfer Doses	Serial Number
<input type="checkbox"/> Delivery 12/07/2020	Pfizer-BioNTech (25 MDV) C...	Toe River (Loc 2)	Incoming Transfer in Transit	390	
<input type="checkbox"/> Delivery 12/09/2020	Moderna (10 MDV) COVID-...	Toe River (Loc 2)	Incoming Transfer in Transit	195	
<input type="checkbox"/> Delivery 12/08/2020	Pfizer-BioNTech (195 MDV) ...	Toe River (Loc 2)	Incoming Transfer in Transit	195	

Next

# Step 3 of 4: Complete the Inbound Transfer form

Once you select the correct Vaccine Inventory record, you will see the Vaccine Inventory record details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound transfer / redistribution is now processed.

- 1. Enter the **DATE RECEIVED**
- 2. Enter the **DOSES RECEIVED**
- 3. Click **NEXT**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Previous

Name: Delivery 12/07/2020

Product Name: Pfizer-BioNTech (25 MDV) COVID-19 Vaccine

NDC #:

Lot: U7875AA

Expiration Date: 12/9/2020, 12:00 PM

Serial Number:

Account: Toe River (Loc 2)

Date Received

Dec 9, 2020

Doses Received

390

Incoming Doses Quantity: 390

Previous

Next

## Audience

Healthcare  
Location Manager

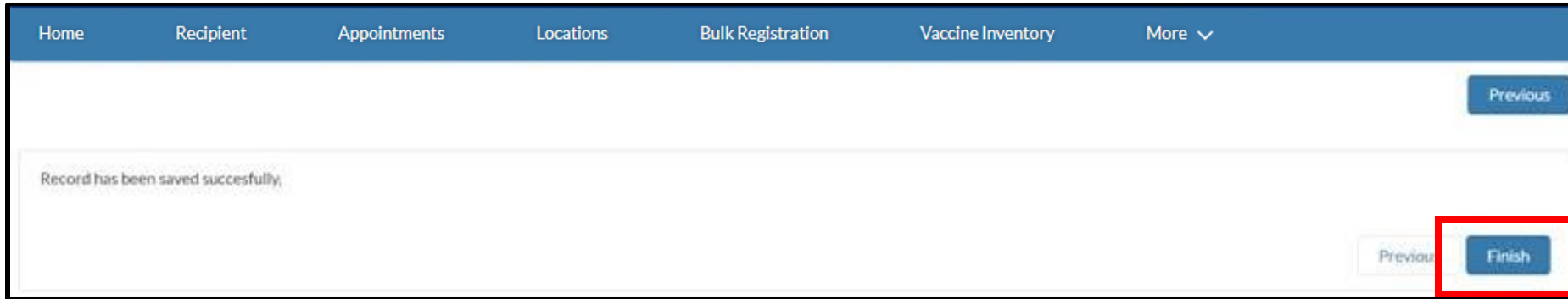
## Tips

Identify doses received and date received for the Vaccine Inventory.

## Step 4 of 4: Complete the Inbound Transfer

After clicking next, your inbound transfer / redistribution is processed and added to your inventory.

1. Click **FINISH**



The screenshot displays the 'Vaccine Inventory' section of the 'Healthcare Location Manager' application. A blue navigation bar at the top contains links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and a More dropdown menu. Below the navigation bar, a message box states 'Record has been saved successfully'. At the bottom right of the main content area, there are two buttons: 'Previous' and 'Finish'. The 'Finish' button is highlighted with a red rectangular border, indicating the next step in the process.

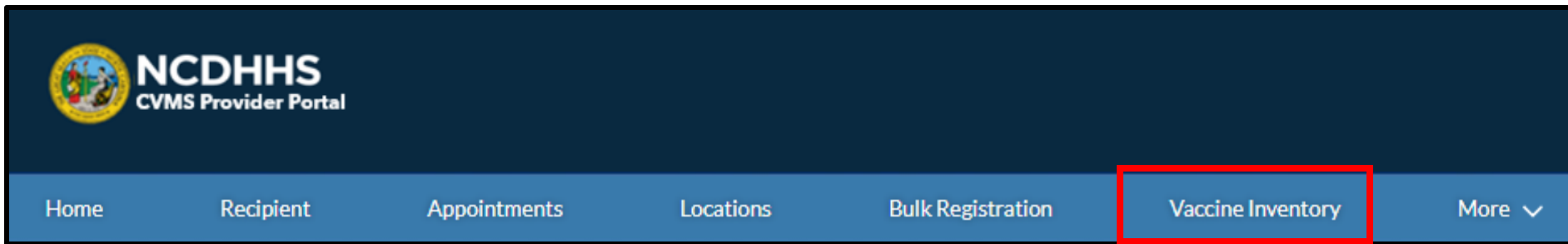
### Audience

Healthcare  
Location Manager

# Updating Vaccine Inventory Record Details

## Step 1 of 3: Navigate to the Vaccine Inventory tab

1. At the top of your home page, locate the **VACCINE INVENTORY** tab
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY** list view



### Audience

Healthcare  
Location Manager

### Tips

NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.

## Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can **SEARCH** or **SORT** in the list view.

- 1. Identify the **VACCINE INVENTORY RECORD** that you wish to update
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK**

### Audience

Healthcare  
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

7 items • Sorted by Expiration Date (MM/DD/YYYY) • Filtered by All vaccine inventories • Updated a few seconds ago

Delivery 02/09/2021

Vaccine Inven...	Account N...	Product Name	To...	D...	D...	Expiration ...	Date and Tim...	Lot	Status	Usage (First or...	Created Date	
1	Delivery 02/09/2...	Clinic ABC Loc 1	Pfizer-BioNTech ...	0	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	123	Incoming Transfer...	First Dose only (1...	2/9/2021, 12:31 ...



## Step 3 of 3: Update the Vaccine Inventory Record

**Vaccine Inventory Details**

\*Vaccine Product  
Pfizer-BioNTech (6 doses/vial) (195 MDV) COVID-1... X

\*Lot  
PF27521

\*Expiration Date  
Date: 9/24/2021 Time: 12:00 PM

\*Vaccine Inventory Name  
Delivery 05/12/2021

\*Account  
TestLoc\_UAT1 X

Date Received  
Date: 5/12/2021 Time: 12:21 PM

Total Vials  
195

Status  
Available

Federal Allocation?  
☐

State Sponsored Contract  
☐

**Dose Amounts**

Total Doses  
1,170

Cancel Save

Before you edit, make sure you are on the appropriate record.

*Remember, you must always save your changes.*

1. Click the **EDIT BUTTON** on the right-hand side
2. Locate the field you want to make changes to
3. Update the field
4. Click **SAVE**
5. If the field does not update, click **REFRESH** and try again

### Audience

Healthcare  
Location Manager

### Tips

Vaccine Inventory Status can be edited by Completing the Vaccine Inventory (Review next section).

If additional doses of the Vaccine Inventory are identified, use the Extra Doses field to edit that Inventory directly.

# Reviewing Vaccine Inventory History

Vaccine Inventory  
Delivery 01/20/2021

Account

Clinic ABC Loc 1

Total Doses

300

Extra Doses

0

Doses Available

280

Doses Administered

20

Do

0

DETAILS

RELATED

Appointments (6+)

New

Appointment	Contact Name	Status	Vaccine Status
00112244	Lonzo Ball	Closed	Dose 1 Administered
00112228	Peter Parker	Closed	Dose 1 Administered
00112225	Anthony Stark	Closed	Dose 1 Administered
00112223	Mariah Carey	Closed	Dose 1 Administered
00112220	Judd Apatow	Closed	Dose 2 Administered
00112217	Mario Lopez	Closed	Dose 2 Administered

View All

Wastage Events (0)

New

Orders (0)

New

Vaccine Inventory History (6+)

Date	Field	User	Original Value	New Value
1/26/2021, 6:50 PM	Date and Time Receiv...	Azalea Troche	1/15/2021, 6:10 PM	1/15/2021, 2:30 AM
1/26/2021, 5:39 PM	Extra Doses	Azalea Troche		0
1/26/2021, 5:00 PM	Doses Administered	sergio.lizano.paniagua	19	20
1/26/2021, 1:11 PM	Doses Administered	sergio.lizano.paniagua	18	19
1/26/2021, 1:00 PM	Doses Administered	sergio.lizano.paniagua	17	18
1/26/2021, 12:30 PM	Doses Administered	sergio.lizano.paniagua	16	17

View All

All changes and edits made to the Vaccine Inventory Record are captured within the CVMS Provider Portal in the Vaccine Inventory History.

1. From the Vaccine Inventory Record, click on the **RELATED** tab.
2. Scroll down to **VACCINE INVENTORY HISTORY**
3. Review all Vaccine Inventory History

*Click View All to look at all the Vaccine Inventory History changes made to the record.*

## Audience

Healthcare  
Location Manager

## Adding Comments/Notes to a Vaccine Inventory Record

Dose Amounts	
Total Doses <sup>(1)</sup>	Doses Administered <sup>(1)</sup>
100	2
Extra Doses <sup>(1)</sup>	Doses Wasted <sup>(1)</sup>
	0
Doses Available <sup>(1)</sup>	Doses Insufficient Quantity <sup>(1)</sup>
98	0
Incoming Transfer Doses <sup>(1)</sup>	Doses Transferred <sup>(1)</sup>
Doses Lost in Transit <sup>(1)</sup>	Doses Received <sup>(1)</sup>
0	
Inbound Transfer?	Outbound Transfer?
<input type="checkbox"/>	<input type="checkbox"/>
▼ Comments/Notes (Optional)	
Comments/Notes <sup>(1)</sup>	

Any comments/notes related to the Vaccine Inventory record can be captured in the **COMMENTS/NOTES** field.

1. From the Vaccine Inventory Record, scroll down to the **COMMENTS/NOTES (OPTIONAL) SECTION**
2. Click the pencil icon to edit
3. Add any comments/notes in the free text field and click **SAVE**

[illegible]

## Audience

## Healthcare Location Manager

# Marking a Vaccine Inventory as Complete or Reserved for Future Use

# Step 1 of 3: Navigate to Vaccine Inventory Record

When a Vaccine Inventory record has zero available dose left, and no extra dose can be extracted from the vials, you will be able to update the Vaccine Inventory record status as Complete. This will help the NCDHHS allocation team to identify which Vaccine Inventory records do not have any remaining doses to be administered.

- 1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORD** that you wish to update
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK**

## Audience

Healthcare  
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

7 items • Sorted by Expiration Date (MM/DD/YYYY) • Filtered by All vaccine inventories • Updated a few seconds ago

Delivery 02/09/2021

	Vaccine Inven...	Account N...	Product Name	To...	D...	D...	Expiration ...	Date and Tim...	Lot	Status	Usage (First or...	Created Date
1	Delivery 02/09/2...	Clinic ABC Loc 1	Pfizer-BioNTech ...	0	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	123	Incoming Transfer...	First Dose only (1...	2/9/2021, 12:31 ...

# Step 2 of 3: Click the Change Status Button

- 1. At the top of the Vaccine Inventory page, locate the **CHANGE STATUS** button
- 2. Click the **CHANGE STATUS** button

Audience

Healthcare  
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Vaccine Inventory

Delivery 02/16/2021

Request Transfer/RedistributionChange StatusEdit

Account	Total Doses	Doses Available	Doses Administered	Doses Wasted	Doses Insufficient Quantity
<a href="#">RPA Location 1</a>	5,000	4,997	3	0	0

DETAILS

RELATED

▼ Vaccine Inventory Details

Vaccine Product

[Pfizer-BioNTech \(5 doses/vial\) \(195 MDV\) COVID-19 Vaccine](#)

Lot

1234567

Expiration Date

4/30/2021, 12:00 PM

Usage (First or Second Doses)

First Dose only (100%)

Total Vials

1,000

Vaccine Inventory Name

Delivery 02/16/2021

Account

[RPA Location 1](#)

Date Received

2/16/2021, 4:21 PM

Status

Available

Federal Allocation

☐

## Step 3 of 3: Select the Complete Status & Save

You will be prompted to update the **STATUS**. Once you save your changes, the Vaccine Inventory status will update accordingly. Definitions for each status are provided on this screen to ensure you select the appropriate **STATUS**.

1. Select the appropriate **STATUS**
  - Complete
  - Reserved for Future Use
  - Available
  - Transferred
  - Wasted
  - Incoming Transfer in Transit
2. Click **SAVE**

**Change Status**

\* Status  
Complete

<b>Complete (Definition)</b> Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.	<b>Reserved for Future Use (Definition)</b> Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.
<b>Available (Definition)</b> Use when there is a least one dose of this inventory remaining. Only inventory with this status and 'Doses Available > 0' will be shown in the Vaccine Administration flow.	<b>Wasted (Definition)</b> Indicates all doses & vials within this inventory were wasted. Only records with 'Doses Available = 0' can have this status.
<b>Transferred (Definition)</b> Indicates all doses & vials within this inventory were transferred/redistributed to another Location. Only records with 'Doses Available = 0' can have this status.	<b>Transfer in Transit (Definition)</b> Please do NOT manually set this status. Indicates this inventory is an inbound transfer/redistribution that has not yet arrived. The 'Inbound Transfer' button & flow is used to accept the inventory and automatically updates the status to 'Available'.

Cancel Save

### Audience

Healthcare  
Location Manager

### Tips

Use this feature to update the Vaccine Inventory status to Complete when you have zero doses available.

# Failed Complete Status Update

The alert screen below will be displayed if your doses available does not equal 0. You will be unable to update the Vaccine Inventory Status to Complete until the appropriate adjustments are made to your Vaccine Inventory. Once resolved, you can go back and Complete the Vaccine Inventory Status.

Change Status

Review the errors on this page.

\* Status

Complete

Doses Available must equal 0 (zero) to mark this Status=Complete. Please adjust Extra Doses, Doses Administered, and/or Doses Wasted as needed in order for "Doses Available" calculation to indicate a value of 0.

Complete (Definition)

Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.

Reserved for Future Use (Definition)

Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.

Cancel

Save

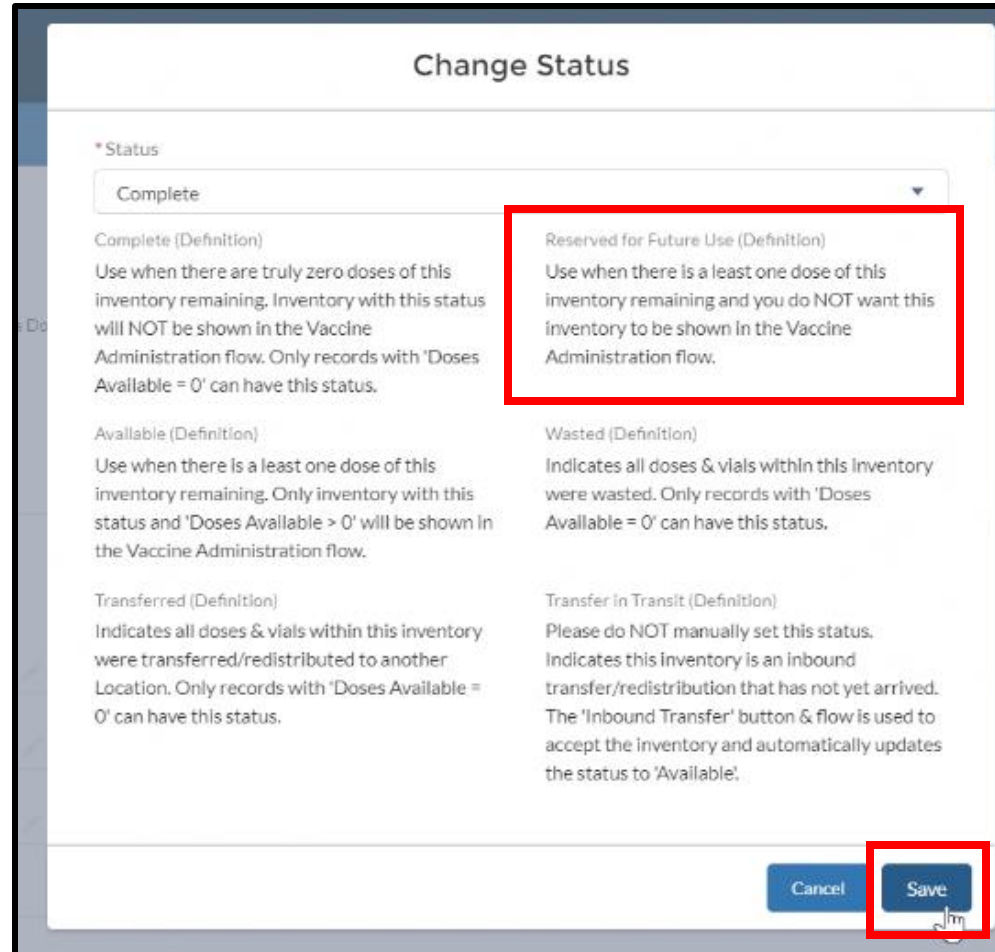
## Audience

Healthcare  
Location Manager



## Reserved for Future Use Status

Putting a Vaccine Inventory Record in the **RESERVED FOR FUTURE USE** status will remove it from being displayed on the vaccination administration screen for Healthcare Providers to select when vaccinating recipients.



**Change Status**

\* Status

Complete

**Reserved for Future Use (Definition)**  
Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.

**Complete (Definition)**  
Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.

**Available (Definition)**  
Use when there is a least one dose of this inventory remaining. Only inventory with this status and 'Doses Available > 0' will be shown in the Vaccine Administration flow.

**Wasted (Definition)**  
Indicates all doses & vials within this inventory were wasted. Only records with 'Doses Available = 0' can have this status.

**Transferred (Definition)**  
Indicates all doses & vials within this inventory were transferred/redistributed to another Location. Only records with 'Doses Available = 0' can have this status.

**Transfer in Transit (Definition)**  
Please do NOT manually set this status. Indicates this inventory is an inbound transfer/redistribution that has not yet arrived. The 'Inbound Transfer' button & flow is used to accept the inventory and automatically updates the status to 'Available'.

Cancel Save

### Audience

Healthcare  
Location Manager

### Tips

This status may be helpful to flag Inventory Records at a location that should not be selected by Healthcare Providers when vaccinating recipients (e.g., reserved for second dose, reserved for upcoming mass vaccination clinic, flagged for transfer or redistribution).

# Receiving Federally Allocated Vaccine Inventory (FEMA and FQHC only)

# Receiving Inventory from Federal Allocation Overview

A **federally allocated vaccine inventory** means that the vaccine inventory shipment was sent on behalf of the Federal Government.

- **State Allocations:** If the inventory is sent on behalf of the State, your primary Vaccine Coordinator should have been sent an email and a shipment record should be available in the CVMS Provider Portal.
- **Federal Allocations:** If the inventory is sent on behalf of the Federal Government, there will **NOT** be a shipment record in the CVMS Provider Portal, and you should follow the steps below to mark the inventory as Federal Allocation in the CVMS Provider Portal.

**This process is designed primarily for FEMA and FQHC designated locations. Non-FEMA/FQHC Provider that also receive Vaccine Inventory from 'Federal Allocation' should also mark those inventories. If the option to mark the inventory is not available, please contact the CVMS Help Desk (instructions on slide 2).**

**NOTE: Federal COVID-19 vaccine allocations to Federal Pharmacy Partners are NOT tracked or managed in CVMS.**

## Audience

Healthcare  
Location Manager

## Tips

Before you receive a Federal Allocation, ensure the read only field **Able to Receive Federal Allocations?** checkbox is checked on your account record.

# Step 1 of 2: Navigate to the Vaccine Inventory Tab

To declare a new Vaccine Inventory record as a **Federal Allocation**:

- 1. Click **ADD** from the Vaccine Inventory Tab

## Audience

Healthcare  
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer


Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Vaccine Inv...	Account N...	Product Name	To...	D...	D...	Expiration Da...	Date and Tim...	Lot	Status	Usage (First o...	Created Date
----------------	--------------	--------------	-------	------	------	------------------	-----------------	-----	--------	-------------------	--------------



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## Step 2 of 2: Complete New Vaccine Inventory Record Form

1. Populate all required **VACCINE INVENTORY FIELDS**
2. Add the label **FED** - to the beginning of the *Vaccine Inventory name* so that it is easily identifiable.  
*Note:* This is a required labeling standard for ALL Federal Allocations (e.g., “FED – Delivery”)
3. Check the **FEDERAL ALLOCATION?** Checkbox
4. Click **SAVE**

New Vaccine Inventory: New Vaccine

Reminder(s)

Moderna Instructions  
Moderna can now be shipped in 10 doses/vial (NDC: 80777-273-99) or 14 doses/vial packaging (NDC: 80777-273-98). Please ensure you select the correct Moderna 'Vaccine Product'.

Fields

\*Account ⓘ  
Search Accounts... 🔍

\*Vaccine Inventory Name  
FED Lot XXX Delivery 05/14/2021

\*Expiration Date  
Date Time  
Date Received  
Date Time  
5/14/2021 12:48 PM

\*Vaccine Product  
Search Vaccine Products... 🔍

\*Total Doses ⓘ  
Extra Doses ⓘ

\*Lot  
Lot XXX

Federal Allocation? ⓘ  
☒

State Sponsored Contract ⓘ  
☐

Shipment Details

Cancel Save & New **Save**

### Audience

Healthcare  
Location Manager

### Tips

Remember that it is a best practice to always add the LOT NUMBER to all vaccine inventory names.

# How to Check if your Location is Set to Receive Federal Allocations

If you are unable to check the **FEDERAL ALLOCATION?** Checkbox from the vaccine inventory record, you may want to check if the **ABLE TO RECEIVE FEDERAL ALLOCATIONS?** checkbox is checked on your Account record.

1. Navigate to the **VACCINE INVENTORY** tab
2. Click on the Account Record associated with the receiving location
3. Ensure the **ABLE TO RECEIVE FEDERAL ALLOCATIONS?** checkbox is checked

The screenshot displays the CVMS interface. On the left, the 'Vaccine Inventories' tab is active, showing a table of vaccine records. The 'Account N...' column is highlighted with a red box, showing 'Clinic Location1'. On the right, the 'DETAILS' tab for 'Clinic Location1' is open. The 'ABLE TO RECEIVE FEDERAL ALLOCATIONS?' checkbox is checked and highlighted with a red box.

Vaccine I...	Account N...	Product Na...	Usage (First...	To...	D...	D...
1 Delivery 03/05...	Clinic Location1	Janssen COVI...	First Dose only...	100	94	6
2 Delivery 03/13...	Clinic Location1	Moderna (10 ...	Second Dose o...	10	0	10
3 Delivery 03/16...	Clinic Location1	Pfizer-BioNTec...	First Dose only...	5,900	5,898	2
4 Delivery 03/19...	Clinic Location1	Moderna (10 ...	First Dose only...	100	98	2

**Account Information**

Account Name	Clinic Location1	Parent Account	Vaccination Clinic
Provider PIN	7178	Primary Coordinator Full Name	John three Deere three
VTckS ID for this location	5235355	Primary Coordinator Email	natebemartin+jd311b@gmail.com
Unique Location ID	LOC-03416	Organization Email	
COVID-19 Vaccination Provider Type	Urgent care	Unique COVID-19 Organization ID (Sect A)	ORG-04857
Status for Location	Assigned	Redistribution Participant	Yes
Able to receive Federal Allocations?	<input checked="" type="checkbox"/>	Available to Receive Vaccine Allocation	Yes

## Audience

Healthcare  
Location Manager

## Tips

If the box is not checked, you will not be able to check the Federal Allocations check box on the Vaccine Inventory record. In the meantime, you can add "FED -" to the VACCINE INVENTORY NAME to communicate that it is a Federal Allocation.





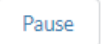
To receive the Federal Allocation checkbox functionality, contact the CVMS Help Desk at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).

# Appendix

# Additional Notes

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## Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- **\* Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

## Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).

## Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see [https://help.salesforce.com/articleView?id=getstart\\_browsers\\_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.



# User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	<ul style="list-style-type: none"> <li>Original version</li> </ul>		Azalea Troche
2	12/21/2020	<ul style="list-style-type: none"> <li>Updated shipment email notification</li> <li>New slides on List Views and Account (Location) Record</li> </ul>	<ul style="list-style-type: none"> <li>12</li> <li>10, 20, 21, 22</li> </ul>	Nicholas Rinz
3	12/31/2020	<ul style="list-style-type: none"> <li>Tips on adding inventories</li> </ul>	<ul style="list-style-type: none"> <li>10, 16, 17</li> </ul>	Simon Couderc
4	1/10/2021	<ul style="list-style-type: none"> <li>Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information.</li> </ul>	<ul style="list-style-type: none"> <li>1, 2, 6, 13, 29, 30</li> </ul>	Courtney Seward
5	1/14/2021	<ul style="list-style-type: none"> <li>Updated navigation bar</li> </ul>	NA	Azalea Troche
6	1/22/2021	<ul style="list-style-type: none"> <li>Removed Account Inventory Slides</li> <li>Add reports tab on navigation bar</li> <li>Extra Doses</li> <li>Complete Vaccine Inventory</li> </ul>	<ul style="list-style-type: none"> <li>NA</li> </ul>	Nicholas M. Rinz
7	1/28/2021	<ul style="list-style-type: none"> <li>Updated screen shots to show new nav bar</li> </ul>	<ul style="list-style-type: none"> <li>5-31</li> </ul>	Kristin Clark
8	2/8/2021	<ul style="list-style-type: none"> <li>Updated Declare Vaccine Allocation Availability Section</li> </ul>	<ul style="list-style-type: none"> <li>22,23</li> </ul>	Nicholas M. Rinz
9	2/14/2021	<ul style="list-style-type: none"> <li>Updated screenshots and verbiage to Insufficient Quantities</li> <li>Updated Vaccine Allocation Availability section</li> </ul>	<ul style="list-style-type: none"> <li>7,16,17,18,19,20,21,25,31, 32,35,36,37, 23, 24</li> </ul>	Kristin Clark
10	3/2/2021	<ul style="list-style-type: none"> <li>Updated screenshots and added federal allocation slide</li> </ul>	<ul style="list-style-type: none"> <li>22</li> </ul>	Nicholas M. Rinz
11	3/10/2021	<ul style="list-style-type: none"> <li>Updated screenshots and added vaccine inventory comments</li> </ul>	<ul style="list-style-type: none"> <li>All, 36</li> </ul>	Nicholas M. Rinz
12	3/15/2021	<ul style="list-style-type: none"> <li>Federal Allocation for non-FQHC or FEMA sites</li> </ul>	<ul style="list-style-type: none"> <li>22</li> </ul>	Darrell Lee
13	3/18/2021	<ul style="list-style-type: none"> <li>Update Change Allocation Status tips and default status</li> </ul>	<ul style="list-style-type: none"> <li>24,25</li> </ul>	Nicholas M. Rinz
14	3/25/2021	<ul style="list-style-type: none"> <li>Update federal Allocation for non-FQHC or FEMA sites</li> </ul>	<ul style="list-style-type: none"> <li>42,43,44,45,46</li> </ul>	Nicholas M. Rinz
15	5/14/2021	<ul style="list-style-type: none"> <li>Updated screenshots and addition of SSC</li> <li>Remove reference to Usage (1st/2nd dose)</li> </ul>	<ul style="list-style-type: none"> <li>17, 18, 19, 33, 45</li> </ul>	Darrell E. Lee